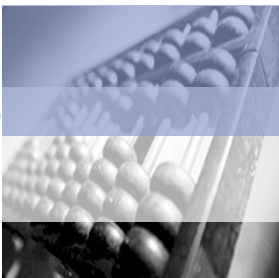


**XYNTAX**

*Manuals*

Product Documentation



Includes features to Version 7.06.02

**Copyright © 2006 Xyntax Group Inc. All rights reserved.**

This manual, as well as the software described in it, is furnished under license and may be used or copied only in accordance with the terms of such license. The content of this manual is furnished for informational use only, is subject to change without notice, and should not be construed as a commitment by Xyntax Group Inc.

Xyntax Group Inc. assumes no responsibility or liability for any errors or inaccuracies that may appear in this documentation. Xyntax Native Systems and Xyntax Systems is a wholly owned division and Trade-name of Xyntax Group Inc., Calgary, Alberta, Canada.

These pages are for reference material only and are not intended for training purposes.

Xyntax makes no representation or guarantee as to the validity or accuracy of the material contained herein.

Xyntax Systems  
#2, 118 Railway Street West  
Cochrane, AB, T4C 2B5

# Enter/Edit Individual's Data

## Enter/Edit Individual's Data

This program is used for entering information on members. To search through bands press F5 or to search by member listing press F10. Once you have selected the member two sections are available for input of information, personal information and additional info.

### In the personal information section the following fields are available :

**Surname** - Enter full surname of band member

**Given Name** - Enter full given name, the middle name may also be included in this field.

**Other Surname** - If you enter a name here this is the name that will appear on cheques

**Other Given Name** - If a name is entered here it is the one which will appear on any cheques

**Street** - Enter street address or post office box.

**City** - Name of city or town where the member resides

**Province** - Enter province

**Postal Code** - Enter postal code

**Phone Number** - Enter phone number

**SIN - (Social Insurance Number)** The system will confirm if SIN number is valid, if the SIN number is unknown you may enter to leave field blank.

**Birth Date** - Enter birth date, be sure to enter in the requested format.

**Marital Status** - (M) Married (S) Single or (O) Other, what the other may represent can be typed into the comments fields in the additional information section.

**Vote Eligible** - (Y) or (N) this is used for statistical purposes.

**On Reserve** - (Y) on reserve, (N) off reserve, or (O) other

**Sex** - (M) Male, (F) Female, or (O) Other (if gender is unknown)

**Category** - Classification codes, these are optional INAC classification codes and are used for statistical purposes.

**Changed** - This date will change automatically update whenever there are any changes applied to the band member or when they are first entered into the system.

**Operator** - This field shows the operator that last changed the members status. (Used as a security feature)

**New Member #** - If the member has changed their band member number it appears in this field. However editing of the number is completed in BP # 21 Change Band Member Number.

**Old Member #** - If the member has had their number changed the old band member number will appear in this field.

### In the additional information section these are the available fields :

**Employed** - (Y) or (N)

**Company Name** - Enter the company name which the member is employed with.

**Blood Quantum** - Optional if you choose to enter blood quantum

**Comments** - Any additional commenting will be entered here, up to 60 characters per line.

**Member Since** - Insert the date the individual became a band member

**Registration Date** - Enter the date the member was registered with the band

**PCD pay-to # and Non PCD pay-to #'s:** Cannot be accessed through this program, the information is updated in BP # 6.

Another option available is to enter skills and education of each member. Press F5 to display this screen. Enter the education or skill codes that apply to the member, these codes will have been setup in BP #7 Enter/Edit Education and Skills Codes. A section to record dates of employment and job description is also available. When exiting this screen be sure to read the screen carefully, you must press <Enter> to save the changes, if you press F4 the information will not be saved.

#### Related Documents

[Change Band Member Number \(BP21\)](#)

[Enter/Edit Education & Skill Codes \(BP7\)](#)

# Enter/Edit PCD Pay-To Info

## PER CAPITA DISTRIBUTION (PAY-TO INFO)

The PER CAPITA DISTRIBUTION update establishes the 'Pay-To' rules for guardians who will be receiving payments on behalf of minors in their care. **IMPORTANT: If this program is not used for minors, payments will be made directly to them.**

When creating the PCD batch file (AP.99-6), the computer system reads the Band Membership database and cross references the PCD Pay-To Info list. A batch of Invoices are created from these two programs for eventual posting and payment.

**Note** - There are some situations where the minor's payment is to be paid to a non-band member or institution. In this situation, when it is time for the PAY TO member's number, enter 'HOLD'. This will prevent any invoice or payment generation for this account.

### Minor (or 'In Trust' Person)

Enter the Minor's Band number. When the computer views the Minor's band number, it will automatically re-direct the payment to the information stored in the other sections (PCD Payments Only or Non PCD Payments), depending on the program used to generate the AP invoices. After selecting the Minor's number, the birth date is displayed to verify the correct individual.

### PCD Payments Only

This section is used by the AP 99-6 (PCD Batch Enter and Edit) program. Enter the individual who will be receiving the payment on behalf of the minor when a PCD batch is created.

### Non-PCD Payments

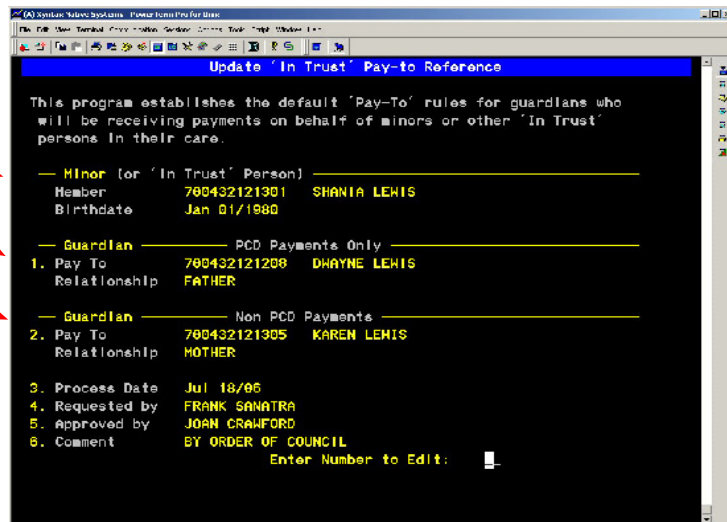
The Non-PCD section is for normal Account Payable invoicing. When the Minor's band number is entered into the AP section (AP 10, 16, or 28), the invoice will automatically 'fill-in' the Pay-To information from this section. During the PCD batch invoice creation process, this section is ignored.

Minor's Section

PCD Payment Only Section

NON PCD Payment Section

Comments



**Note** - Entries can be present in either the PCD Payment only section or the NON PCD Payments section or both.

### Printing

To print a report listing all individuals in the Pay-To database, press F2.

## Enter/Edit Education & Skill Codes

### Enter/Edit Education & Skill Codes

In this program you will setup education and skill codes that are used in #4 Enter/Edit Individual's Data.

To begin, you must decide if you will be setting up education or skill codes. E - Education codes and S - Skill codes. Choose E and then decide on a three character code to serve as the code used when you enter the data into BP # 4. Then enter the description. When you have finished typing the description you will be asked if this is OK ? (Y) or (N). The same order will be followed when entering a skill code.

#### Related Documents

[Enter/Edit Individual's Data \(BP4\)](#)

## Change Member Status

### Change Member Status

In this program you can change the status of band members. The available choices are, (A) Active, (I) Inactive, or (D) Deceased. When a members status is changed here, it will automatically update in Band Membership # 4 Enter/Edit Individual's Data. The system does not allow posting to inactive or deceased members.

Make sure Pay-To information in PCD Database (BP 6) is deleted and any outstanding invoices (AP or AR) are also cleared PRIOR to changing band member status. Also check for outstanding purchase orders and Social Development forms. The system will not allow you to change the status of a member if they are on any open invoices.

#### Related Documents

[Enter/Edit Individual's Data \(BP4\)](#)

[Enter/Edit PCD/Pay to Information \(BP6\)](#)

## Change Band Member Number

### Change Band Member Number

This program allows you to change member band numbers. When members become of age to have their own number, or when a person gets married are cases when you may have to change a members band number. It is imperative that you do not set up the members new number in BP # 4. All changes to the members number are completed in this program.

The new number you have entered here will appear in the old number field of BP # 4. Once you have entered the new number the system will not allow posting to the old member number. Ensure that Pay-to information in PCD Database (BP # 6) is deleted and any outstanding invoices (AP or AR) are also cleared PRIOR to changing a Band Number. Also, check for outstanding Purchase Orders and Social Development forms.

**Note** - All accounting history is not transferred to new number

#### Related Documents

[Enter/Edit Individual's Data \(BP 4\)](#)

[Enter/Edit PCD/Pay to Information \(BP 6\)](#)

# Member Report Generator

## Member Report Generator

This program allows you to create and print specialized band member reports. In the program there are four options:

- Print a report
- Work on report design
- Print report listing
- Print code listing

**Print a report** - After choosing option 1 to print a report, enter the number of the report, or press F5 to search. Once you have selected the report that you want to print, choose (Y) to begin report generation. Choose your printer.

**Work on report design** - If creating a new report enter a number to represent the report.

**A. Title** - Enter the report title

**B. Include** - This option allows you to include all members (AID), Active (A), Inactive (I), or Deceased (D).

**C. Sorted by** - Choose how you want this report to be sorted by. If you choose surname, then the report will list the members in alphabetical order by surname.

**D. No. of columns** - Once the report is completed it will display the number of columns in the report, up to 15. Which you can edit after the report has been completed if you want to include additional information.

Decide what other information you want in the report, such as band number, given name, SIN, or date of birth. You can enter the codes if you know them, if not, search by typing E (main screen) or S (skills and education) then press F10. Be sure to insert them in the order you want them to appear in the report.

In lines 16 through 18 you can set the conditions for this report. For example if you want to generate a report of all active members over the age of 18. In the condition code you would type E then F5 to search for the date of birth code (E09) then in the requested format from the oldest band member (usually safe with entering 1900/01/01) then the date 18 years prior to date that you want to generate the report.

**Print report listing** - The report listing, is a listing of all reports that have been designed. It will display the report number, title, codes used, which will essentially show what type of information the report will generate. Also, it will show what code the report has been sorted by.

**Print code listing** - This option will print a list of codes and the length of these codes, this will save time by not having to search through the codes. It will also allow for organization of reports before entering them into the system.

**The codes are as follows :**

### Report Code Description and Length

- E01 MEMBER CODE 13
- E02 SURNAME 20
- E03 GIVEN NAME 20
- E04 STREET ADDRESS 30
- E05 CITY 30
- E06 PROVINCE 30
- E07 POSTAL CODE 10
- E08 OTHER SURNAME 20
- E09 BIRTH DATE 6
- E10 SIN 9
- E11 OTHER GIVEN NAME 20
- E12 STATUS DATE 6
- E13 SPARE

- E14 ON RESERVE 1
- E26 MARITAL STATUS 1
- E28 VOTE ELIGIBLE 1
- E50 STATUS (A, I OR D) 1
- E60 SEX 1
- E61 EMPLOYED 1
- E62 COMPANY 40
- E63 BLOOD QUANTUM 6
- E64 COMMENT 1 60
- E65 COMMENT 2 60
- E66 COMMENT 3 60
- E70 OLD MEMBER NUMBER 13
- E97 Electronic Account Active 1
- E98 Electronic Banking info 9
- E99 BLANK CO



## Band Membership # 51 Band Member Listing

### Band Member Listing

This report will print all band members which are currently on file, they will be in alphabetical order. You may choose to print all band members, or print band members within a range of numbers. If you want to print a range, choose (N) and then you will be asked what numbers to start and end with.

Decide if you would like to include all ages in this report if yes press <Enter> if you want to print members between certain dates choose (N).

Now enter the latest birth date of the members to be included, then the earliest date of birth of members that are to be included. Decide if you want the SIN to appear on the report. Then generate this report, and choose your printer.



## Band Membership # 52 Non-Member Listing

### Non-Member Listing

This program will print lists of non-members. You have 3 options : Non-status Individuals, Status Native (Pending Membership), and Status Native (Non-Members)

**Non-status Individuals** - Choose from which district, what band member is non-status, and if you want the SIN included in the listing.

**Status Native (Pending Membership)** - This report will print a list of non-member with native status with pending membership.

**Status Native (Non-Member)** - This report will print a list of non-members with native status.

Note : If Band Members appear on a non-member list ensure that in field 26 of BP # 4 Enter/Edit Individual's Data has information entered.

#### Related Documents

[Enter/Edit Individual's Data \(BP4\)](#)



## Band Membership # 54 Band Member Labels

### Band Member Labels

This program allows the operator to print band member labels, provided, that you print from a dot matrix printer. There is the option to print labels for all members, or select members on a individual basis.

If you have chosen to print labels by selected members type (S), and you will have the option to press F5 to search by band, or F10 to search by member name. If you choose labels for all band members press <Enter>. Now decide if you want to include members under the age of 16. Enter the band member number you wish to begin with and then the ending band member number. Now choose your printer.

**Note - You must use a dot matrix printer.**



## Band Membership # 55 Miscellaneous Labels

### Miscellaneous Labels

This program will allow the operator to print labels, with the text of choice. They have the choice to print from A to Z or individually. If you choose A to Z press <Enter>, you be asked how many copies you want. If you decide on (I) individually, the next will be to select your printer. Lines one through five will now display, type them in the format you want the label to appear. Make sure to press <Enter> after each line. When finished entering information press F4, and the label will print.

**Note - You must use a dot matrix printer.**



## Band Membership # 56 Band Listing by Family

### Band Listing by Family

This report generated will list by families number or by alphabetically. The listing is current and includes only families within the specified band. There is the choice to generate the report by surname (S) or by family number (F).

Information in this report will be the family name and number, the members given names, and as well the member number they are in the family . The date of birth is also included. At the end of the report, the number of individuals, and family numbers are totalled.



## Band Membership # 95 Membership Program Defaults

### Membership Program Defaults

In this program you are able to setup a default address for all band members when using Enter/Edit Individual's Data (BP 4). To enter this program type 95 then press F2. When all band members have the same general address this will save time on data entry.